

Human Resource Management System

Workday Job Aid View/Change Personal Information



Employees can easily view and edit Personal Information from their Profile tab.

- ☒ Employees
- ☐ People Managers
- ☐ Human Resources

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1. Personal Information Overview

In this job aid, you will learn to update your personal information. You can update information such as your contact info, profile picture, identification, and legal name. Depending on the information you want to update, you may need to provide supporting documents and seek approvals. Through the use of applications listed on the Workday Home Page and menus listed on your Workday profile, you can easily access and modify personal data.



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2. View Profile

Start the process from the Workday Homepage.

1. Select your photo in the upper right-hand corner. If you do not yet have a photo, this will appear as a cloud. (See Figure 1 below).

Note: If you are unsure whether you are on the Workday Home Page, click the Workday symbol (the 'W' symbol on the top left of the page). Clicking the Workday symbol will always take you to the Workday Homepage.

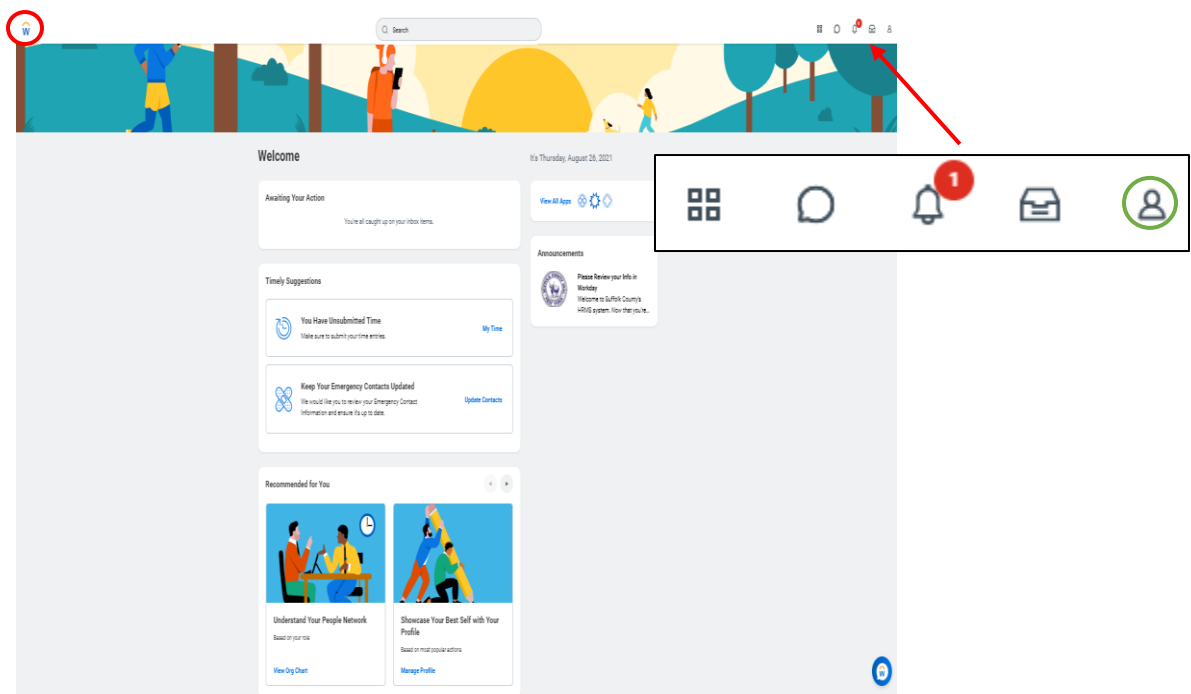




Figure 1

 = Workday symbol  = Photo or cloud to view profile

2. Select View Profile to view your Workday profile.



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3. Change Contact Information

Start the process from the Workday Home Page. (See [Figure 1](#)).

1. Click on the **Personal Information** application after clicking on the **View all Apps** link on the Workday Home Page (To add applications to your Homepage, see [Job Aid Workday Getting Started](#), Lesson 8 "Adding Applications").
2. Under the **Change** section, click **Contact Information**.
3. You are now on the **My Contact Information** page. Click the **Edit** button at the top of the page to change either your Home Contact Information or Work Contact Information.
4. To change the information, click the edit button (pencil icon) on the right side of the box to be edited.
5. When changing your address, enter the **Effective Date** (the date this change is taking place) and enter the changed data, including the required fields (marked with a red asterisk).
6. To add new information, click the **Add** button at the bottom of the section you are working on.
7. If you have supporting documentation to provide regarding the change, attach it at the bottom of the page by clicking **Select files** and selecting the file you wish to attach. You may also drag the file you wish to select into the dotted gray box.
8. Click **Submit**.
9. You will receive a notification that **You have submitted** the contact information change.



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4. Change Emergency Contact Information

Start the process from the Workday Home Page. (See [Figure 1](#)).

1. Click on the **Personal Information** application from the Workday Home Page.
2. Under the **Change** section, click **Emergency Contacts**.
3. You are now on the **My Emergency Contacts** page. Click the **Add** button if you have no emergency contacts listed. Click the **Edit** button if you wish to change the existing emergency contact(s).
4. Click the edit button (pencil icon) to the right of the fields you wish to enter/change. Be sure the emergency contact's name, address, and phone number are listed.
5. Click **Submit**.
6. You will receive a notification that **You have submitted** the emergency contact change.



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5. Change Legal Name

Based on certain life events (marriage, divorce, adoption), you may use the Change Legal Name process to modify your name. Supporting legal documentation is required to complete this process.

Start the process from the Workday Home Page. (See [Figure 1](#)).

1. Click on the **Personal Information** application from the Workday Home Page.
2. Under the **Change** section, click **Legal Name**.
3. Edit your name, which is currently listed as it is entered in Workday.
4. Provide supporting documentation of this name change by attaching it to the bottom of the page by clicking **Select files** and selecting the file you wish to attach. You may also drag the file you wish to select into the dotted gray box.
5. Enter a **description** and **category** for the uploaded documentation (choose the **Personal Information** category).

Note: You will need to provide a copy of your updated social security card for this change to occur. If you do not upload documentation, the process will not be submitted and will be saved for later.

6. Click **Submit**.
7. You will receive a notification that **You have submitted** the change legal name task.
7. Your Payroll Representative must now review and approve your legal name change.



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6. Change Preferred Name

If you choose, your preferred name will display within Workday next to your legal name.

Start the process from the Workday Home Page. (See [Figure 1](#)).

1. Click on the **Personal Information** application from the Workday Home Page.
2. Under the **Change** section, click the **More** hyperlink to reveal additional selections.
3. Click **Preferred Name**.
4. You are now on the **Change My Preferred Name** page.
5. If you are currently using your legal name as your preferred name, a checkmark appears on the top of the page next to "Use Legal Name as Preferred Name." If you wish to instead use a preferred name, uncheck this box.
6. Edit your name as listed. This will appear for others to see in Workday.
7. Click **Submit**.
8. You will receive a notification that **You have submitted** the change preferred name task. Your preferred name will now be visible to the right of your legal name within Workday.



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7. Change Business Title

Start the process from the Workday Home Page. (See [Figure 1](#)).

Note: This task can only be performed by an **HR Administrator**.

1. Enter the employee's name in the Search Bar.
2. Select the employee from the returned results.
3. Once the employee's record displays, click on the Action button.
4. Hover over the Job Change Menu item and then click on the **Change Business Title** on the menu that pops up to the right.
5. You are now on the **Change Business Title** page. The employee's current job title is listed at the top of the page.
6. Enter the **Effective Date** you wish for your business title change to take effect.
7. Enter the proposed **Business Title**.
8. You may enter a comment related to the business title change. If you have supporting documentation to provide regarding the change, attach it at the bottom of the page by clicking **Select files** and selecting the file you wish to attach. You may also drag the file you wish to select into the dotted gray box.
9. Click **Submit**.



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8. Upload Worker Documents

An employee may upload documents related to benefits, certifications, a DD214, time off, status as a retiree, onboarding, licenses, a leave of absence, an employee contract/agreement, and other instances.

Start the process from the Workday Home Page. (See [Figure 1](#)).

1. Click on the **Personal Information** application from the Workday Home Page.
2. Under the **View** section, click the **More** hyperlink to reveal additional selections.
3. Click **Worker Documents**.
4. You are now on the **Maintain My Worker Documents** page. You may upload relevant worker documents by clicking the **Add** button.
5. Attach the worker documents by clicking **Select files** and selecting the file you wish to attach. You may also drag the file you wish to select into the dotted gray box.
6. Once the document is uploaded, select the **Document Category**. You may also enter a comment.
7. Click **Ok**.
8. You should now see the worker document uploaded.
9. Click **Done**.



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9. Edit ID Information

1. Start the process from the **Workday Home Page** (See [Figure 1](#)). Navigate and select View Profile to view your Workday profile.
2. From your Workday profile, scroll down on the left column and select **Personal** (click the **More** link to view additional selections).
3. Select the **IDs** tab on the top right side of the page.
4. Select the **Edit** button.
5. From the Edit drop-down list, select **Change My Government IDs, Change My Licenses or Change My Passports and Visas** to update or change the information already listed.

Note: If you are adding or updating a license, please attach a copy.

6. You may add an additional form of ID by clicking the add (+) symbol on the top left of the table. This will add an additional column for you to enter data.
7. Click a field you wish to modify and enter the new ID information. Fields with asterisks are required.
8. If you wish to add another ID, click the add symbol on top of the left column to add an ID row, then add the related ID information.
9. Click **Submit**.
10. The employee as well as Audit and Control will receive a notification that this task was submitted. Audit and Control will review and approve the submitted ID information.



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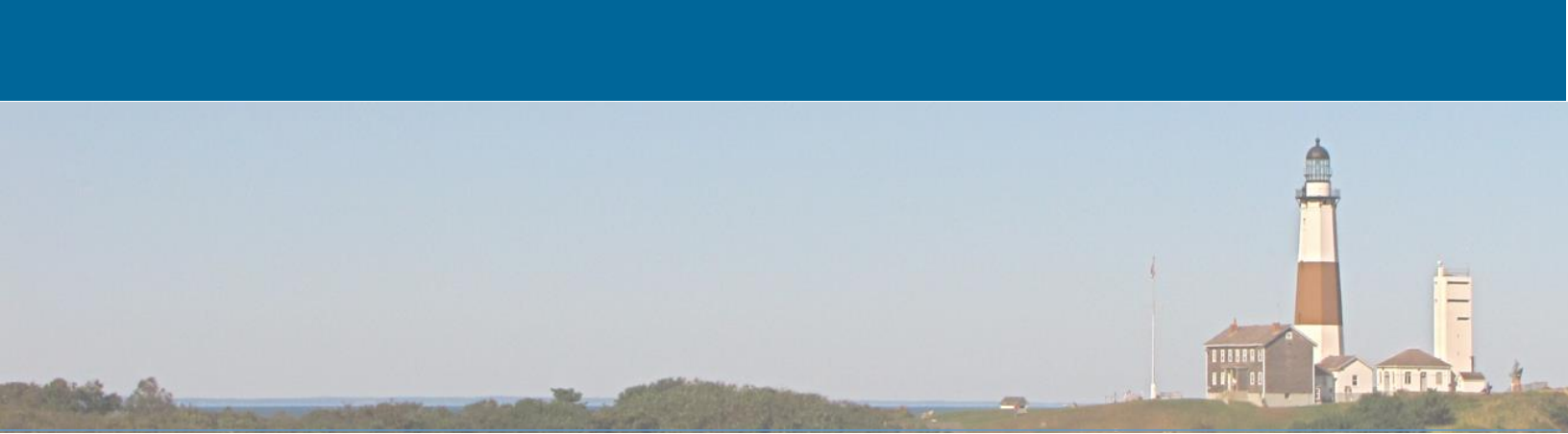
10. Photo Change

Note: Photos must be a headshot of yourself.

Start the process from the Workday Home Page. (See [Figure 1](#)).

1. Click on the **Personal Information** application from the Workday Home Page.
2. Under the **Change** section, click **Photo**.
3. If you do not have a photo listed, it will not appear, and 'no current photo' will be listed on the top of the page under **Current**. To upload a photo, attach it by clicking **Select files** and select the file you wish to attach. You may also drag the file you wish to select into the dotted gray box.
4. You may change what appears within your photo by resizing the white circle within your picture.
5. Click **Submit**.
6. You will receive a notification that you have submitted the photo change task.





11. Edit Other IDs (Benefits Partner, HR Partner)

1. Start the process from the Workday Home Page (See [Figure 1](#)).
2. Type the employee's name in the search at the top of the page.
3. Click on the employee's name from the search results.
4. From the employee's Workday profile, scroll down on the left column and select **Personal** (click the **More** hyperlink to display additional selections).
5. Select the **IDs** tab on the top right side of the page.
6. Select the **Edit** button.
7. Select **Edit Other IDs**.
8. To add a new ID, click the add (+) symbol on the top left of the table. This will add an additional column for you to enter data.
9. From the drop-down, select the type of ID you are adding (Alternate ID, Retirement Number, etc.).
10. Enter the related ID information.
11. Click **Submit**.
12. You will receive a notification that you have submitted this task.





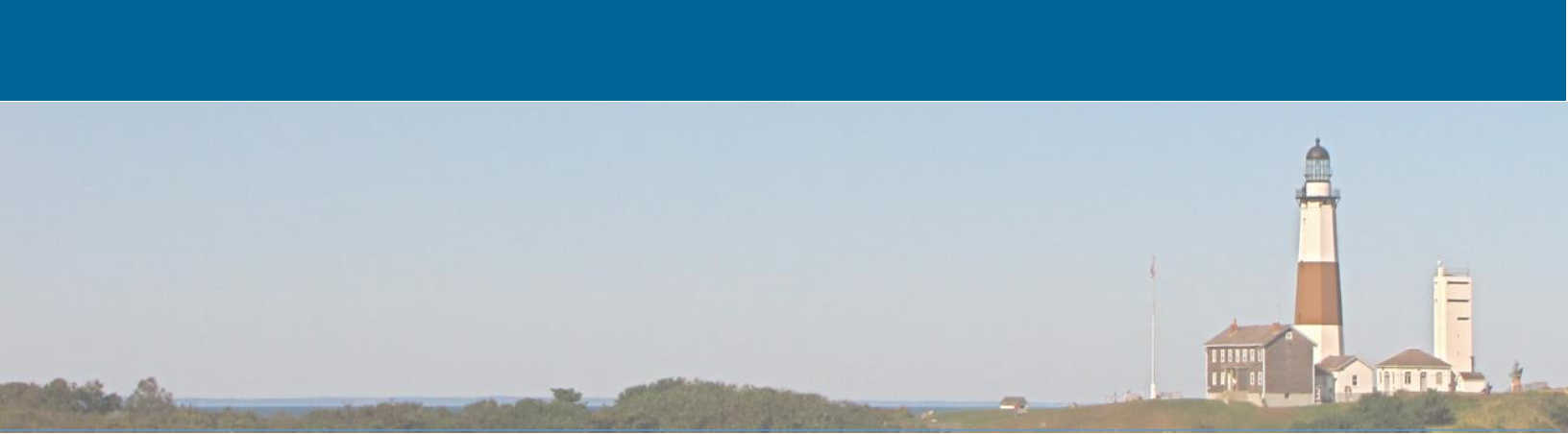
12. Set-Up/Edit Direct Deposit

Start the process from the Workday Home Page (See [Figure 1](#)).

1. Click on the **Pay** application from the Workday Home Page.
2. From the **Actions** section, click on **Payment Elections**.
3. You are now on the **Payment Elections** page. If you currently have a direct deposit account set up, you should see it listed. You can edit the current direct deposit account by clicking **Edit** or **Remove** to the right of the account information.
4. If you wish to add a direct deposit account, click the **Add** button in the middle of the page.
5. Enter the required information. You can add an Account Nickname to help identify this account.
6. Click **Ok**.
7. Your new account should now be listed under **Accounts**.
8. To select this account as a Payment Election, select **Edit** to the right of your current direct deposit account under **Payment Elections**.
9. After selecting the United States of America as the **Country** and USD as the **Currency**, select **Direct Deposit** under Payment Type.
10. Under Account, select your newly added account.
11. Under Balance/Amount/Percent, allocate the amount from each paycheck you wish to go into this account.

Note: If you wish to remove a previous payment election account listed, click the remove button (minus symbol) to the left of the account.





12. Click **Ok**.
13. You should now see your Payment Election listing your new account.





13. View/Edit/Print Tax Information

1. To view/change your tax elections, first, start the process from the Workday Home Page (See [Figure 1](#)).
2. Navigate and select View Profile to view your Workday profile.
3. From your Workday profile, scroll down on the left column and select **Pay** (you may have to click the **More** link to view additional selections).
4. Click on the Tax Elections tab on the right side of the page.
5. You are now viewing your current Federal and State tax withholdings.
6. To update the Federal tax withholding, click the **Update** button below the Federal withholding information.
 - Enter the **Effective Date** of the change, then click **Ok**.
 - Update your W-4 Data.
 - Click the box next to **I Agree** at the bottom of the page then click **Ok**.
7. To update the State tax withholding, click the **Update** button below the State withholding information.
 - Enter the **Effective Date** of the change, then click **Ok**.
 - Update your New York IT-2104 Data.
 - Click the box next to **I Agree** at the bottom of the page then click **Ok**.





14. Check Pay Statements

Start the process from the Workday Home Page (See [Figure 1](#)).

1. Click on the **Pay** application from the Workday Home Page.
2. From the **View** section, click on **Payslips**.
3. You are now viewing your Payslip Printing details and your Payslips.
4. You may view each payslip by clicking **View** to the right of each different payslip.
5. You may print a payslip by clicking **Print** to the right of each different payslip.





15. Access Year-End Tax Documents

Start the process from the Workday Home Page (See [Figure 1](#)).

1. Click on the **Pay** application from the Workday Home Page.
2. From the **View** section, click on **My Tax Documents**.
3. You are now viewing the My Tax Documents page. Tax documents that have been previously issued are listed here. You may also edit whether you wish to receive electronic copies or both electronic and paper copies of your Year-End Tax Documents. To edit your printing election, click the **Edit** button, select your new election then click **Ok**.





Change Log				
Revision	Date of Change	Affected Lesson	Action	Initials
1.1.1.1	09/15/2021		Log Created	RK